**Sample: Customer Service Knowledge Management**

**Requirements Template**

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| **Requirement** | **\_\_\_\_\_\_\_\_\_** |
| Central point to find knowledge/answers |  |
| Fast reliable search with:   * Predictive suggestions * ‘Did you mean?’ suggestions * Ranking * Key words |  |
| Process guidance with   * Drop-down to see all steps in the process (to skip irrelevant steps) * Flow chart view * Navigation function |  |
| Easy way to announce product, process and policy changes without taking staff off the phones (eliminating emails). Must be possible to   * Centrally control where it is filed * When it is referred to, * Be fully reportable and time sensitive, e.g. expire when the information is in the past so a person starting a shift after the event does not see it. * Send notification to Agents when in another system there is an urgent announcement to be read |  |
| Easy way to keep knowledge current and relevant to optimise utilisation ie.   * Feedback * Ratings * Pre-set review dates |  |
| Ability to deliver answers through multi-channels i.e.   * Intranet * Corporate Website * Chat * Virtual assistant etc |  |
| ‘Favourites’ feature so Agents can get easy access to regularly used knowledge |  |
| Format which delivers answers to questions not long PDF/Word documents |  |
| Ability to simplify the most complex customer enquiry down to a few standard questions (decision matrix) but still ensure the correct answer every time |  |
| A quiz function to check Agent’s understanding of knowledge |  |
| Continuous improvement mechanism that allows staff/users to quickly provide process improvement suggestions within seconds |  |
| Workflow Management – allowing the organisation to decide who has authority to Author, Edit, Review, Publish etc. |  |
| Permissions feature so the organisation can manage who is allowed to see what knowledge within your system |  |
| Customer journey sensitive with:   * Related links to regularly asked secondary questions * Can embed video, google maps and any other customer preferred communication channel |  |
| Managed by the business – not IT |  |
| Easy to access 24/7 service and help desk |  |
| Easy to follow, easily searchable help site |  |
| No IT project or build cost |  |
| Up and running in weeks - Obtain efficiencies in weeks |  |
| Tablet Compatible |  |
| Enhancements and new features as technology evolves – at no cost |  |
| Cloud for remote access and disaster recovery |  |
| Ability to protect data sovereignty (Australia) |  |
| Single sign-on functionality |  |
| Knowledge is standalone – APIs to serve knowledge/answers through any system – i.e. CRM, Telephony, Ticketing, Virtual Assistant/Chat-bot |  |
| Easy to access reports and analytics regarding:   * Most Popular search term/questions * Zero search result * Who is accessing What information * Least accessed knowledge * Announcement Read Report * Feedback * Knowledge usage * Quiz * Login * Agent action history |  |